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FinancialPlanning

Wealthtech Weekly

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Reporter

Happy New Year! I took over the Wealthtech Weekly newsletter in November 2024, so I've been writing these every week for more than a year now. Thank you to each of you for reading during all that time. I sincerely appreciate it. Before the new year gets rolling, here are a few of my favorite stories from 2025. I'm looking forward to joining you again each week as 2026 kicks off.

I hope you'll check out these articles.

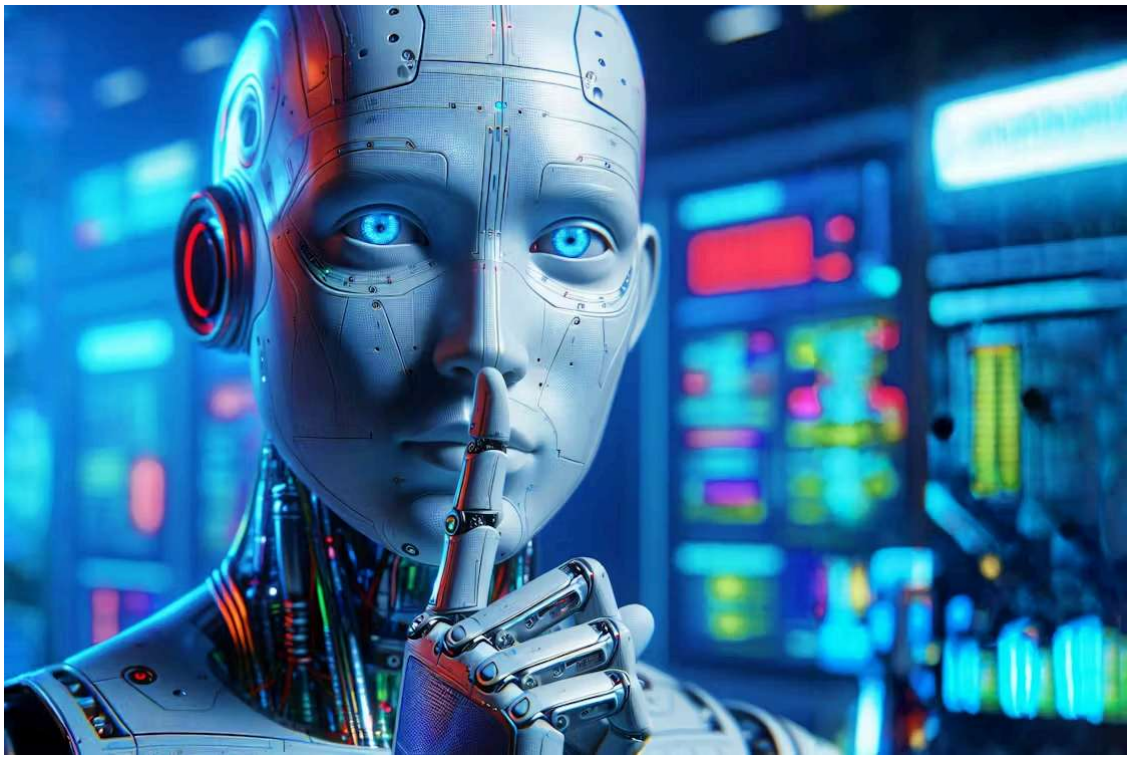
As always, thank you for reading. Happy Holidays! Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

When AI goes wrong in wealth management



Artificial intelligence tools are everywhere in the wealth management industry, with providers promising increased efficiency and time savings. Things don't always go as planned, though.

- **Don't think AI will replace you? That's this CEO's goal**
  As Financial Planning's AI Readiness Survey showed, most advisors aren't concerned about their own jobs. But others aren't so sure.
- **Want to build a better tech stack? See how these advisors did it**
  Some of the most important decisions a firm will make revolve around tech choices; mistakes can be costly and onerous to undo. Here's how advisors at seven firms chose their tech stacks.
- **Posthumous AI avatars are here. Estate planning needs to adjust**
  It may sound like science fiction, but experts say estate planners should help clients decide now how their likeness should, or should not, live on after their death.
- **Despite AI's allure, client relationships remain the crux of advisors' work**

Even with all the advancements in artificial intelligence in the past few years, Financial Planning's new research shows human connection remains at the center of advisors' work.

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